Developing a Comprehensive M&E Work Plan

What is a Monitoring & Evaluation Work Plan

- ☐ **Provides structure to M&E**
- ☐ **The overall purpose & scope of the M&E in your organization**
- ☐ **Organizes, systemizes, & integrates M&E**
- ☐ **It's the what, the who, why, when, and how in one document**
- ☐ **Communication tool**

Why?

☐ Guides monitoring and evaluation activities:

- **M&E BUY IN**
- **Efficiency – saves time**
- **Effectiveness – doing what we want to do**
- **Data management**
- **Data Quality & Data Use**

Components of an M&E Work Plan

- ☐ 1. Introduction: Laying the foundation
- ☐ 2. M&E Frameworks
- ☐ 3. Indicator Protocol
- ☐ 4. Evaluation Plan
- ☐ 5. Implementation
- ☐ 6. Data Quality
- ☐ 7. Data Use

Develop an M&E Plan

☐ Prepare a planning document for monitoring and evaluation that will describe all the activities to be conducted, by each player at his/her level to monitor and evaluate the program

Develop a M&E Plan

- ☐ Establish together (with the partners and participants) a calendar for data collection: what data will be collected, when, where and by whom
- ☐ Implement the plan!!
- ☐ Monitor the plan

Engagement Strategies
LEVERS:

- ☐ Creating a compelling vision
- ☐ Establishing urgent need
  - ■ Why, what will happen without…
- ☐ Leading the change
  - ■ Good leaders create leaders, not just followers
  - ■ Demonstrating each persons role (leadership) in M&E
- ☐ Engaging various levels of stakeholder
- ☐ Charting transition
  - ■ Progress towards out goal
- ☐ Sustaining energy
  - ■ The positive choice
- ☐ Aligning systems
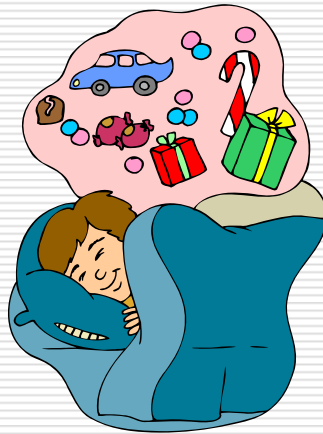 - ■ Resources (systems) in place (staff, communication)

Introduction: Laying the foundation

Laying the Foundation

- ☐ Mission and/or Vision Statement**
- ☐ Define program goal & objectives**
- ☐ Background / Context
- ☐ Funding mechanisms
- ☐ Stating the purpose
- ☐ M&E Team
- ☐ Audience Analysis

Mission and/or Vision Statement

- ☐ What is a Mission Statement?

- ☐ What is a Vision

- ☐ Examples?

Goals   -see handout-

- ☐ Present the desired outcomes, accomplishments, result or purpose sought (<u>not the process</u>!)
- ☐ Capture broad changes in conditions, <u>answering</u> the "so what" question (So... we trained 100 people and increased their knowledge but did or did they not change their behavior?).
- ☐ Often goals that reflect behavior, attitude or economic change and show how our activities contribute toward a larger development impact.
- ☐ Usually reflect a result achieved an intermediate time period (2-5 years).

Objectives

- Are linked directly to the goals and state the outputs--information, products, processes, services or results you hope to <u>produce</u> that will support attainment of the goal.

- Reflect what you hope to produce by undertaking a specific activity. For example: You decide you want to train people (the activity) then and objective will relate to the knowledge you have increased.

- Usually reflect a result achieved in a relatively <u>short-time</u> period (0-2 years).

Objectives are SMART:

- **S**pecific: The objective states a specific output to be accomplished. The output is stated in numbers, percentages, frequency, reach, scientific outcome, etc. The object is defined.

- **M**easurable: The objective can be measured and the measurement source is identified.

- **A**chievable: The objective or expectation of what will be accomplished is realistic given the time period, working conditions, resources etc.

- **R**elevant: The output of the objective supports the goals sought in the project.

- **T**ime-bound: Clearly states when the objective will be accomplished.

M&E Work Plan Development:
Laying your foundation

Results Framework

| Input	Activity	Output	Outcomes	Impact
What goes in… What you budget for..	*What you do to reach your goal… Each activity may have its own framework.*	*What you get from your activity… more immediate Relates to your project OBJECTIVES.*	*What you get… down the road and involves some sort of change in behaviour, knowledge, attitude… Relates to your project GOALS.*	*How activity affects population… long term. Relates to Mission / Vision*

M&E Work Plan Development: Results Framework

- ☐ Reexamine Vision / Mission and program Goals & Objectives
- ☐ Framework is built upon this foundation
- ☐ Define Inputs, Outputs, Outcomes, Impacts
- ☐ Build a frame appropriate for your organization / project
- ☐ EXAMPLES!

M&E Work Plan Development: *Implementing Your Plan*

IMPLEMENTATION PLAN

- ☐ **Key Activities**
- ☐ **Target Beneficiaries**
- ☐ **Time Frame**
- ☐ **Persons Responsible**
- ☐ **Anticipated Results**
- ☐ **Budget**
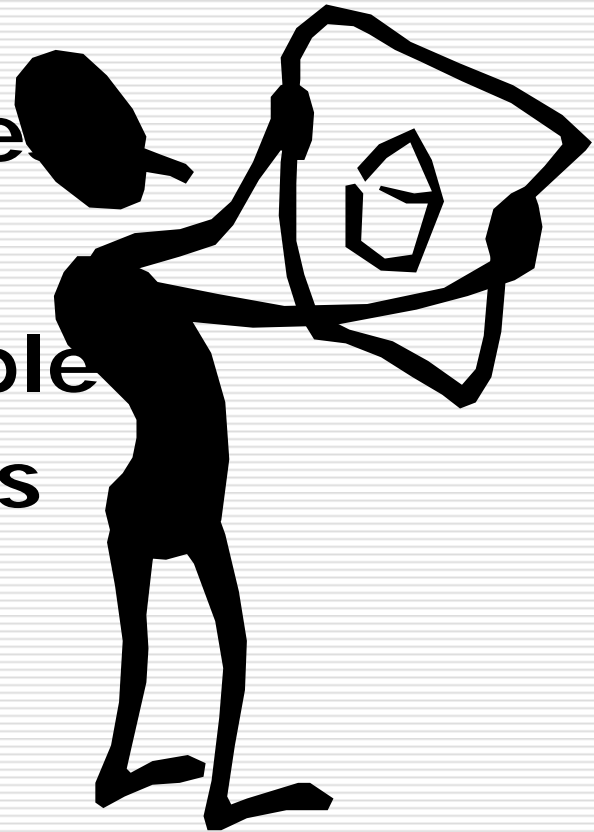
M&E Work Plan Development: Indicators

INDICATOR INFORMATION SHEETS

- ☐ Indicator name, level, and responding result
- ☐ Description: Definition, Unit of Measure, Disaggregation, Justification
- ☐ Plan for Acquisition
- ☐ Data Quality
- ☐ Data Analysis, Reviews, and Reporting
- ☐ Indicator Values (target and actual)

Evaluation Plan

- ☐ Enables you to evaluate *why* you have or have not achieved the objectives and goals that were set for the project.
- ☐ Allows you to look at consequences, intended or unintended.
- ☐ Effectiveness, efficiency, impact and sustainability.
- ☐ Looks at the project overall: operations, governance and deliverables.
- ☐ Helps you identify the lessons learned and what you would do better next time.
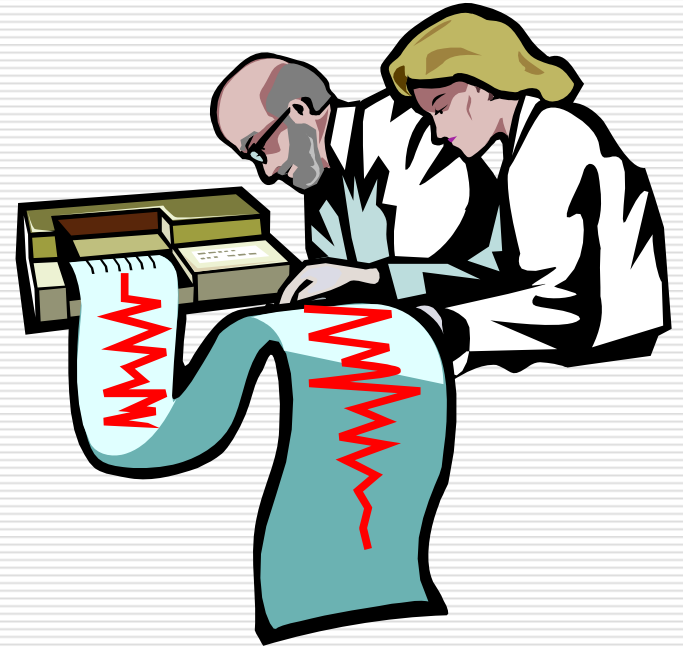
Evaluation Plan

What do we need to evaluate?	What do we want to know?	How will we obtain the data?	When will we get the data?	Who will do this?

M&E Work Plan Development: Data Use

☐ Tools to facilitate appropriate and effective use of data

- Audience Analysis
- Activity Results & Dissemination Plan
- Reporting Plan

Data Quality Plan

Identifying Data Quality Risks

M&E Work Plan Development: *Managing Data Quality*

- ☐ Data Quality Plan
  - ■ Identifying, analyzing, and managing threats to data quality

M&E Work Plan Development: Additional TOOLS

- ☐ Frameworks and more frameworks
- ☐ Indicator Measurement Tools
  - ■ Indicator, Name of Measurement Tool, and Tool Reference Number
- ☐ Monitoring Tools
  - ■ Operational Area of concern
  - ■ Name of tool, and reference number
  - ■ Update Frequency
- ☐ Reporting Plan
- ☐ Target Setting Sheet

A M&E Work Plan is the <u>structure</u> to your organization's operational house.

A M&E Work Plan is a collaborative process that <u>must</u> be built upon a solid foundation.

Factors That Affect Implementation of M&E Plan

1. Technical Capacity of staff
2. Availability of MIS tools at field level
3. Ensuring uninterrupted flow of consistent data.
4. Stakeholder participation at all levels
5. An effective system in place for data collection, analysis, and feedback.

6. Others???

BE STRATEGIC

Barriers to implementation

- ☐
- ☐
- ☐
- ☐
- ☐
- ☐

M&E SWOT

	Strengths	Weaknesses	
I N T E R N A L	➢ ➢ ➢	➢ ➢ ➢	I N T E R N A L
E X T E R N A L	**Opportunities** ➢ ➢ ➢	**Threats** ➢ ➢ ➢	E X T E R N A L

Engagement Strategies LEVERS:

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M&E WORK PLAN:
Making your PLAN WORK

- ☐ Revisit, revise, adapt
- ☐ Share, send for input
- ☐ Questions ?????

GOOD LUCK ! ! !